OWNER ONBOARDING CHECKLIST

Rymer Realty Group, property management. Everything we need in the first week so the handover is clean.

A good handover takes about an hour of your time and saves months of chasing. Here is what we collect when we take on a property, whether from you directly or from a previous manager.

PROPERTY AND ACCESS

☐ Keys, fobs and codes for every unit, common area, mailbox, basement, utility room and garage

☐ Alarm codes, intercom and smart-lock logins

☐ Floor plans, unit measurements and any surveys or condo documents

☐ Parking assignments and storage assignments

TENANTS AND LEASES

☐ Current signed leases and addenda, with the Lead Law forms

☐ Tenant names, phones and emails, and who is on each lease

☐ Rent amounts, due dates, any arrears or payment plans

☐ Security deposit amounts, bank, account numbers and the statements of condition

☐ Last month's rent held, and the interest history

☐ Open issues: complaints, repairs promised, notices served

MONEY

☐ Owner bank account for direct deposit

☐ Mortgage, tax and insurance details so statements can show the full picture if you want them to

☐ Taxpayer identification for year-end forms

BUILDING OPERATIONS

☐ Utility accounts and who pays what in each unit

☐ Vendor list: plumber, electrician, heating, snow, landscaping, extermination, cleaning

☐ Service contracts and warranties, boiler and water heater ages

☐ Smoke and carbon monoxide detector certificate and dates

☐ Lead inspection or deleading certificates, if any

☐ Town rental registration and last inspection report

☐ Insurance policy and agent contact

YOUR PREFERENCES

□ Repair approval limit before we call you

□ Preferred vendors and anyone not to use

□ How you want to hear from us: email, text or phone, and how often

□ Plans for the property: hold, renovate, sell within a few years

---

Rymer Realty Group LLC, 1309 Beacon St Ste 300, Brookline, MA 02446. (617) 615-9949.
Admin@rymerrealtygroup.com. rymerrealtygroup.com. Mon-Fri 8:00am-6:00pm by appointment only (virtual).
MA Brokerage License #424677. Broker of record Samuel Rymer #9526599.